

SCOPE OF WORK

Transit Development Plan – Attachment A

Phase Activities

1	PROJECT INITIATION -- Kick-Off Meeting/Transit Resource Inventory 1.A Finalize Study Management and Oversight/Advisory Committee 1.B Finalize Community Involvement Process and Schedule 1.C Review Background Information/Inventory Resources 1.D Prepare Letter of Introduction/Attend Initial Project Committee Meeting 1.E Field Survey by Consultant Team 1.F Person Trips
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Task 1.A – Finalize Study Management & Oversight/Project Committee

Conduct Project Team Kickoff Meeting

Attendance: Consultant Team – David Sampson, Marlene Connor; Core City Staff Team – David Cary, Larry Worth, Kent Morgan, Brian Praeuner; other individuals recommended by the City.

Action Items: Discuss the communication and reporting protocol, project scope and intended results, refine the schedule, identify the deliverables, identify the Advisory Committee, identify City staff involvement.

Products: Finalized work scope and project schedule, task completion dates, ongoing reporting procedures and delivery protocol, contact list of Advisory Committee members that will include the StarTran Advisory Board members, contact list of City staff.

Task 1.B – Finalize Community Involvement Process and Schedule

Action Items: Identify public outreach strategies and tools, refine the public outreach schedule, develop list of stakeholders, discuss outreach protocol and responsibilities, identify deliverables.

Products: Finalized public outreach strategy and schedule, completed list of stakeholders and contact information.

Task 1.C – Review Background Information/Inventory Resources

Action Items: Review Consultant's comprehensive data request, assemble reports and databases identified in RFP, assemble additional data items as identified by the Consultant Team and City staff such as land use data and GIS mapping, identify format and protocol for APC data reporting, develop a data collection plan if necessary.

Products: Complete package of background information to Consultant, finalized data collection plan if necessary.

Task 1.D – Prepare Letter of Introduction/Attend Initial Advisory Committee Meeting

Initial Advisory Committee Meeting

Attendance: Advisory Committee – StarTran Advisory Board Members and other individuals recommended by the City; Consultant team – David Sampson, Marlene Connor; Core City Staff Team – David Cary, Larry Worth, Kent Morgan, Brian Praeuner; other individuals recommended by the City; interested public.

Action Items: Prepare and send a letter to the Advisory Committee membership outlining the scope of the Committee’s efforts, proposed meeting dates, and an invitation to hold the first meeting of the Committee. Attend first meeting of the Advisory Committee and introduce the project Consultant Team, provide an overview of the study, the work plan and schedule, finalize the charge to the Committee, and discuss the Committee’s interest and ideas about the study.

Products: Completed and sent letter of introduction to the Advisory Committee and attendance at first meeting of the Advisory Committee. Finalized charge to the Advisory Committee.

Task 1.E – Field Survey by Consultant Team

Action Items: Consultant Team conduct field survey with assistance from City staff as needed.

Products: Completed field survey by Consultant Team.

Task 1.F – Person Trips

The Consultant Team will provide two (2) person trips during this phase of the project.

Phase	Activities
2	PUBLIC OUTREACH AND MEETINGS PLAN – Outreach Strategies
	2.A Conduct Advisory Committee Meetings
	2.B Conduct Stakeholder Interviews
	2.C Hold Public Meetings
	2.D Conduct Drop-In Sessions
	2.E Hold Bi-Weekly Progress Meetings
	2.F Provide Materials for Project Website
	2.G Hold Driver Meetings
	2.H Conduct Formal Presentations and Briefings of Study Findings
	2.I Person Trips

Task 2.A – Conduct Advisory Committee Meetings

Action Items: Attend and conduct six (6) meetings of the Advisory Committee throughout the course of the project, including the initial meeting described in Phase I. Meetings will be held with the Advisory Committee to discuss milestone reports with the membership, for the members to provide insights and comment as needed, and for the members to provide support to the Consultant Team and City staff with the development and presentation of the recommendations of the study.

Product: Six conducted meetings of the Advisory Committee, summary report of each meeting, inclusion of results of Advisory Committee meetings in public outreach technical memorandum, and presentation materials from each meeting.

Task 2.B – Conduct Stakeholder Interviews

Action Items: Conduct stakeholder interviews (up to 30) with a wide variety of individuals and groups (as determined in Phase I) that represent transit interests in the City, including public officials and staff, University of Nebraska officials and student representatives, state and regional agency staff, representatives of major generators, advocacy groups, and community and business leaders. These interviews are to be conducted at the outset of the project and a letter of introduction, similar to the one provided to the Advisory Committee in Phase 1, is to be used to reach out to the stakeholders to set up meetings.

Product: Numerous completed stakeholder meetings, utilized letter of introduction, summary of the findings of the stakeholder interviews, analysis of these findings, and inclusion of results of stakeholder meetings in public outreach technical memorandum.

Task 2.C – Hold Public Meetings

Action Items: Design the format and hold two sets of public meetings during the course of the study. A first set of public meetings will occur early in the study process to gather input from the public. A second set of public meetings will be held after service standards, service alternatives, and management and funding options have been developed.

Products: Two conducted sets of public meetings, written summary of each meeting describing how they were conducted, what comments were received, and how comments were incorporated into the final plan, analysis of what was learned from the public at these meetings, presentation materials from each meeting, and inclusion of results of public meetings in public outreach technical memorandum.

Task 2.D – Conduct Drop-In Sessions

Action Items: Conduct drop-in sessions at key locations to be determined by the Consultant Team and City staff. These sessions are to be conducted early in the study process and shall be held at locations such as a major bus transfer facility and on the University of Nebraska campus.

Products: Conducted drop-in sessions, written summary of comments received at each drop-in session and a description of how these sessions were conducted, how comments were incorporated into the final plan, analysis of what was learned from the public at these meetings, and inclusion of results of drop-in sessions in public outreach technical memorandum.

Task 2.E – Hold Bi-Weekly Progress Meetings

Action Items: Hold bi-weekly progress meetings with the City's Project Manager and other members of the core staff team. The meetings will review progress in the previous two weeks and plan work items for the next two weeks. Issue resolution and overall project direction will be continual aspects of the progress meetings. These meetings will be held via conference call except when they coincide with site visits by the Consultant. More frequent contact may occur between the Consultant Team and the Project Manager as needed.

Products: Bi-weekly progress meetings held with additional meetings held as necessary.

Task 2.F – Provide Materials for Project Website

Action Items: Consultant will provide all documentation, surveys, materials, and notices in PDF format for inclusion on the City's project website. City staff will be responsible for developing and maintaining the website with input from the Consultant, and the website will be updated as material is made available by the Consultant.

Products: Project documentation, surveys, materials, and notices in PDF format for use

on the project website.

Task 2.G – Hold Driver Meetings

Action Items: Consultant team will listen to comments from drivers for most of an entire operating day in the driver ready room. This shall include the early morning before first shift report time to when the last shift ends.

Products: Driver meetings conducted on a specific day, written summary of comments received and a description of how these sessions were conducted, how comments were incorporated into the final plan, analysis of what was learned from the driver meetings, and inclusion of results of driver meetings in public outreach technical memorandum.

Task 2.H – Conduct Formal Presentations and Briefings of Study Findings

Action Items: Formal presentations and briefings of the study findings will be given to the StarTran Advisory Board, the City Council, or other designated policy body identified by City staff. Presentations and briefings will be held to present proposed service standards, service alternatives, and management and funding options and to receive comments on each of these items. Presentations and briefings will also be held to address the final report at the end of the study and to receive comments and answer questions.

Products: Formal presentations and briefings conducted, PowerPoint presentations for each meeting, accompanying maps and visual aids as necessary, and inclusion of results of presentations and briefings in public outreach technical memorandum.

Task 2.I – Person Trips

The Consultant Team will provide three (3) person trips during this phase of the project.

Phase	Activities
3	COMPREHENSIVE OPERATIONS ANALYSIS (COA)
	3.A Data Collection and Construction of Data Bases
	<ul style="list-style-type: none"> • <i>Develop Service Area Characteristics</i> • <i>Transit Service Review</i>
	3.B Prepare First Draft Technical Memorandum
	3.C Person Trips

Task 3.A – Data Collection and Construction of Data Bases

Action Items: Collect and construct data bases necessary for the Comprehensive Operations Analysis. The Consultant Team will work with local staff to develop the required materials in the formats necessary for proper analyses.

- *Develop Service Area Characteristics* – Available detailed information on demographics, land use, and trip generators will be provided to the Consultant, with as much in GIS format as possible. Such data (which is to be identified in Phase 1) will be supplemented by the Consultant with on-site studies of the area such as windshield surveys and in-person conversations (as conducted in Phase 2).
- *Transit Service Review* – Existing transit services reports, including data on the Downtown loop and shuttle services, will be provided by City staff, and data sets such as the Automated Passenger Collection (APC) data will be provided in SPSS 9.0 format for the Consultant Team to use in profiling routes, times of day, et. al. If needed, sources and methods of new data collection will be discussed with City staff and the Consultant Team. This review will cover all aspects of the system, including route structure and operations, financial and operating performance, maintenance facilities and systems, capital assets, and administrative and management structure.

Products: Developed data base needed to conduct a Comprehensive Operations Analysis, APC data imported into a proprietary ride-check system for analytical purposes, performance review of the transit system, assessment of each route relative to system averages, and identification of strengths and weaknesses in the system.

Task 3.B – Prepare First Draft Technical Memorandum

Action Items: Prepare first draft technical memorandum which, when coupled with findings from the public outreach efforts, will provide an understanding of the community and the StarTran network. When combined with available projections, this document will also provide an understanding of the future which will be a key in developing an appropriate phased near and long-term plan.

Product: Draft technical memorandum that contains sections on the transportation setting, socio-economics and land uses, transit facilities, and existing transit and ADA

paratransit services.

Task 3.C – Person Trips

The Consultant Team will provide two (2) person trips during this phase of the project.

Phase	Activities
4	DEVELOP SERVICE STANDARDS AND POLICIES 4.A Define Set of Performance Indicators and Service Standards

Task 4. A – Define Set of Performance Indicators and Service Standards

Action Item: Define a set of performance indicators and service standards to assist in the assessment of transit performance. Once defined, these indicators will be used as a management tool to assess performance and relate the quality and quantity of service to minimum acceptable performance levels at a policy level. Current policy standards will be reviewed to determine if they require changes, and if so, recommendations will be given as appropriate. Consultant recommendations will be reviewed with City staff before developing a draft set for public review and before using them in the assessment phase of this project. Both near-term and long-term implications will be addressed.

Products: A working paper which describes the defined performance indicators and service standards and how they were selected will be provided. This will include a discussion of the past standards used for StarTran and why changes were made, as well as an explanation of how these standards will provide both near-term and long-term guidance for the City related to transit goals and objectives and on-going evaluation of the system. This report will be submitted for City staff review and then presented to the Advisory Committee for review and comment.

Phase	Activities
5	DEVELOP TRANSIT SERVICE ALTERNATIVES
	5.A Congruency Analysis and Service Adequacy
	5.B Needs and Opportunities Analysis
	5.C Define Operations and Service Alternatives
	5.D Analysis of Alternatives
	5.E Person Trips

Task 5. A – Congruency Analysis and Service Adequacy

Action Item: GIS layers showing demographic data, land use and trip generator data, and the transit network will be used to study relationships among the three, thereby determining graphically areas of unmet need or a possible oversupply of services. The Consultant Teams will provide analysis of how effective existing transit service is, where services may need expansion, and where it may be oversupplied. Service standards established in Phase 4 of the project will be used to compare existing services with the new standards.

Products: GIS graphical displays showing relationships between demographic data, land use and trip generator data, and the transit network; analysis of how effective existing transit service is, where it may need expansion, and where it may be oversupplied; comparison of newly established service standards with existing services.

Task 5. B – Needs and Opportunities Analysis

Action Item: Newly established service standards will be applied to the existing bus network to determine what types of changes may be needed and where the changes should be made. Very specific information will be generated in this step and will be used to analyze the level of service provided and how it matches need. Particular attention will be given to work trip needs, especially to those locations where there are jobs which could support entry level wage earners. A specific review of service to both UNL campuses, Southeast Community College, satellite college campuses in Downtown Lincoln, and other colleges will be provided to determine if the needs of UNL and other colleges are being met or if this is an untapped market. This review of existing services, along with a review of services provided by other transit programs, will complete the picture of the needs to be met in the plan.

Products: A technical review of the strengths and weaknesses of the existing transit network, where resources are well-utilized or under-utilized, and where potential markets appear untapped will be provided. A working paper will summarize all of these analyses, and will define the range of opportunities that need to be addressed in the plan. Direction will be given in this working paper that will help develop alternatives. Feedback from City staff and the Advisory Committee will be required before alternatives are developed.

Task 5. C – Define Operations and Service Alternatives

Action Item: The Consultant Team will prepare both near-term and long-term service alternatives by defining operations and service options, analyzing these options, and selecting the most appropriate options to be included in the draft plan. A key component of these options will address the Downtown loop operations, Downtown shuttle concepts, and the Downtown multi-modal center concept discussed in the Downtown Master Plan. Near- and long-term service alternatives will be presented for comment to City staff, the Advisory Committee, public officials, interest groups, and the public as part of a set of public meetings and a formal presentation given to the StarTran Advisory Board, the City Council, and other groups as identified by City in conjunction with the organizational and funding options described in Phase 6.

Products: Defined near-term and long-term operations and service options as service alternatives with analysis of each. A formal presentation of the service alternatives will be given to the StarTran Advisory Board, the City Council, and other groups as identified by City staff. A set of public meetings will be held to present the service alternatives. A PowerPoint presentation and accompanying maps and visual aids will be provided, as will a summary of comments from the presentations and the public meetings.

Task 5. D – Analysis of Alternatives

Action Item: The Consultant Team will provide a sketch plan of each service improvement or package of improvements under consideration with supporting data from which to prepare ridership, cost and revenue forecasts that can then be compared to the newly established level of service parameters. Each proposal will be evaluated based on productivity and a fully allocated cost basis on a route and total basis for the program.

Products: A draft plan will be produced to summarize the congruency and service adequacy analysis, needs and opportunities analysis, evaluation of the operations and service alternatives, and the draft improvement program presented with both near-term and long-term actions. The draft plan will be included in the formal presentation and open house described in Task V.C above. Comments received will be used to shape the draft and final report in Phase 7.

Task 5.E – Person Trips

The Consultant Team will provide four (4) person trips during this phase of the project.

Phase	Activities
6	DEVELOP STARTRAN ORGANIZATIONAL AND FUNDING OPTIONS
	6.A Assess the Current Organizational Structure
	6.B Identify Organizational Options
	6.C Identify Funding Options
	6.D Conduct Presentations and Briefings of Findings
	6.E Hold Public Meetings
	6.F Person Trips

Task 6. A – Assess the Current Organizational Structure

Action Item: The Consultant Team will study and assess the current organizational structure of StarTran, and identify any issues or problems that have emerged in the current context using the findings of the Phase 2 interviews and meetings and the findings of other phases of this project.

Products: Completed review of the current StarTran organizational structure and identification of issues and problems under that structure.

Task 6. B – Identify Organizational Options

Action Item: Develop a list of potential general organizational options and alternatives that offer potential to StarTran in terms of enhancing its long term stability. For each option the Consultant Team will identify the roles of different entities with regard to ownership, policy-setting, planning, operations, staffing and liability aspects of providing transit service. Various sub-options, due to options with regard to funding options, as identified in Task 6.C, will be identified. The Consultant Team will work with City staff and the Advisory Committee to finalize the alternatives prior to completing the analysis. The Consultant Team will look at different organizational models that help explain the workings of each option identified. When possible, a telephone interview with a general manager or other knowledgeable staff will be conducted with a transit system that has made a change to an organizational model under consideration. For each alternative studied, the impacts on funding sources and levels, ridership, public perception, union concerns, costs, and staffing will be provided. Through coordination with the Mayor's Office, the role of state enabling legislation, state funding policies, and state policy with regard to delegation of taxing authority will be reviewed for each option and example as well.

Products: A draft technical memorandum for review by the Advisory Committee and City staff will be provided with revisions included in the draft final report. The memorandum will identify organizational alternatives, describe the state's legal setting for such organizations, define the potential application of the alternatives in Lincoln, identify the likely roles of different entities or groups, present examples as mini-case studies, and identify advantages and disadvantages to each option.

Task 6. C – Identify Funding Options

Action Item: Develop a list of potential funding options and alternatives that offer potential to StarTran in terms of enhancing its long term stability and funding. For each option the Consultant Team will identify the impact on the different organizational alternatives identified in Task 6.B through various sub-options with regard to funding. The Consultant Team will work with City staff and the Advisory Committee to finalize the funding alternatives prior to completing the analysis. Through coordination with the Mayor's Office, the role of state enabling legislation, state funding policies, and state policy with regard to delegation of taxing authority will be reviewed for each option and example as well.

Products: A draft technical memorandum for review by the Advisory Committee and City staff will be provided with revisions included in the draft final report. The memorandum will identify funding alternatives, describe the state's legal setting for such funding options, define the potential application of the alternatives in Lincoln, present examples as mini-case studies, and identify advantages and disadvantages to each option.

Task 6. D – Conduct Presentations and Briefings of Findings

Action Item: Organizational and funding options will be presented by the Consultant at formal presentations and briefings, along with the service alternatives described in Phase 5, and will be given to the StarTran Advisory Board, the City Council, and other groups as identified by City staff. The Consultant will develop a PowerPoint presentation and accompanying maps and visual aids, as well as a summary of comments from the presentation.

Products: A PowerPoint presentation and accompanying maps and visual aids will be provided and presented by the Consultant. A summary of comments gathered during the presentations and briefings will also be provided by the Consultant.

Task 6. E – Hold Public Meetings

Action Item: A set of public meetings will be designed and conducted by the Consultant to present the organizational and funding options along with the service alternative findings discussed in Phase 5.

Products: A set of public meetings will be designed and conducted by the Consultant and accompanying maps and visual aids will be provided, as will a summary of comments from the public meetings.

Task 6.F – Person Trips

The Consultant Team will provide one (1) person trip during this phase of the project.

Phase	Activities
7	DRAFT AND FINAL REPORT 7.A Complete Draft Final Report 7.B Complete Final Report 7.C Conduct Presentations and Briefings of Final Report 7.D Person Trips

Task 7. A – Complete Draft Final Report

Action Item: The Consultant will define all recommendations in a draft final report following acceptance of the draft findings from previous phases. The report will be based largely on the memoranda and papers produced for earlier phases of the project and it will include an executive summary. It will provide materials related to each part of the study:

- Executive Summary
- Background Information and Data Assessment
- Public Outreach and Input Summary
- Comprehensive Operations Analysis
- Service Standards and Policies
- Proposed Service Changes and Alternatives
- Preferred Management Alternatives
- Preferred Alternatives for Funding Options
- Immediate and Short-Term Actions
- Mid- to Long-Range Implementation Strategies

The draft final report will focus upon the proposed service changes and alternatives, preferred management and funding options, the five year action plan of immediate and short term actions, and the mid to long range implementation strategies, which would be a strategic initiative for years 6 and beyond. The five year plan and strategic element will be developed more fully during this phase of the project.

Products: Draft final report, including an Executive Summary and all sections and findings, provided for review by City staff and the Advisory Committee.

Task 7. B – Complete Final Report

Action Item: The Consultant will incorporate any comments on the draft final report from City staff and the Advisory Committee into the report and will prepare and submit the final report. Five bound copies and a reproducible electronic version of the final report will be provided by the Consultant.

Products: Final report provided by Consultant including five bound copies and a reproducible electronic version of the report.

Task 7. C – Conduct Presentations and Briefings of Final Report

Action Item: The Consultant will present the final report to the StarTran Advisory Board, the City Council, and other groups as identified by City staff. A PowerPoint presentation and accompanying maps and visual aids will be provided, as will a summary of comments from the presentation.

Products: A PowerPoint presentation and accompanying maps and visual aids provided and presented by the Consultant, as well as a summary of comments.

Task 7.D – Person Trips

The Consultant Team will provide four (4) person trips during this phase of the project.